



**ATTACHMENT C**  
**PORTLAND PUBLIC SCHOOLS, SCHOOL DISTRICT NO. 1J,**  
**MULTNOMAH COUNTY, OREGON**

**REFERENCES**

**RFP NO. 06-856**

**Consultation Services: Workforce Management Project  
Including Facilitation of Business Process Redesign and  
Implementation of Applicable PeopleSoft Modules**

The number of References required in Response to this RFP is 3. **Proposers shall use a separate copy of this form for each reference required.**

Date(s) Work Performed \_\_\_\_\_

Name of Project(s) \_\_\_\_\_ \$ Value of Project \_\_\_\_\_

Name of Company \_\_\_\_\_

Address \_\_\_\_\_

Contact Name \_\_\_\_\_ Phone \_\_\_\_\_

The method used in evaluating the references for this RFP is indicated below, all references checks will be done the District's Procurement Services Department:

- ☐ Method 1 - Each reference shall be asked to rate their overall experience with the proposer on a scale of 1 to 10, each reference shall then be summed and added to the total evaluation score as a Bonus score over the total possible points.
- ☐ Method 2 - Pass/Fail, all references shall report an overall good experience and would be willing to work on future projects with the Proposer.
- ☒ Method 3 - Subjective Evaluation, each reference will be checked for, but not limited to, adherence to budget, contract terms and conditions, security protocols, timelines, quality standards. The Department will assign a single evaluation score to the provided references for only the highest ranked proposer and each proposal that is within ten (10) points of the highest ranked. This score shall then be added to the evaluation scores as a bonus score over the total possible points. If no proposals are within the ten (10) points of the highest ranked proposer, the district reserves the right to forgo the checking of the highest ranked proposer's references at the Districts discretion.
- ☐ Method 4 - Other

## ATTACHMENT D PROPOSED HOURLY RATES

Proposers are instructed to define and propose hourly rates for all project personnel included in the proposal, by role. Hourly rates must be inserted in the right-hand column in the table below, and the table must be included in the proposal.

Proposers are encouraged, but not required, to supply rates for all of the roles listed. Enter "na" for all roles where a rate is not proposed. If proposers wish to include additional roles in their proposals, the spaces marked "Other" may be utilized; in addition to rates for these additional roles, proposers are instructed to insert "Deliverable Cross-References" per the footnote below. The District shall use the hourly rates proposed in the table below to derive a single cost index value for comparison of different proposals. The proposal that receives the lowest cost index value shall receive the maximum points available for cost evaluation, and all other proposals shall receive Cost evaluation points proportionately fewer than the maximum.

The hourly rates provided in this table (plus reimbursable expenses) shall provide the sole basis for pricing under this contract. If a proposer wishes to actually bill the District on a different rate cycle (e.g. per day, rather than per hour), the proposer must nevertheless propose hourly rates in this table. Rates on the actual billing cycle shall be derived as an appropriate multiple of the hourly rates proposed - e.g. hourly rates shall be multiplied by 8 to arrive at daily rates. The District shall agree to alternate billing cycles only if the request for an alternate billing cycle is included in the proposal.

Role Description	Deliverable Cross-Reference *	Proposed Hourly Rate
Project Manager	various	
Lead Business Analyst	1,2,4,6	
Business Analyst	1,2,4,6	
Lead Systems Analyst/Developer	2,3,5	
Systems Analyst/Developer	2,3,5	
System Administration Support	3,5	
Database Support	3,5	
Lead Trainer	6,7	
Trainer	6	
Other		
Other		
Other		
Other		
Other		

\* The District generally relates consultant roles to the deliverables noted in sections 1.3.4 and 1.3.5, as follows:

- 1) Existing business process analysis
- 2) Fit-gap analysis
- 3) Technical analysis
- 4) Implementation of process changes
- 5) Implementation of technical changes/customizations
- 6) Training plan
- 7) Communication plan



**EMPOWER  
SOLUTIONS**  
AN INTELLIGROUP COMPANY

EMPOWER SOLUTIONS  
DELIVERABLES FOR  
PORTLAND PUBLIC SCHOOLS

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# **PORTLAND PUBLIC SCHOOLS PROCESS ANALYSIS WORKSHOP DELIVERABLES**

**MAY 31, 2005**



**EMPOWER  
SOLUTIONS**  
AN INTELLIGROUP COMPANY

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**PeopleSoft,**

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# INTRODUCTION

The purpose of this document is to outline the Process Analysis Workshop conducted for Portland Public Schools by Empower Solutions. It details the initial scope of Phase I, and it outlines the findings resulting from the workshop and the recommendations based on these findings. This deliverable also outlines a high-level timeline for the implementation of these recommendations at Portland Public Schools.

# PROJECT SCOPE

During Phase I of this project Empower Solutions will work with the Portland Public Schools to identify areas for streamlining processes and improving communication. Based on the District's Workforce Management Project Charter this phase will focus on two main areas. These areas as specified in the charter are outlined below:

- Staffing Projection to Allocated FTE
  - *Current business processes require **school** administrators **tu** conduct staffing projections in multiple formats:*
    - *Formut for IIR*
    - *Format for DOSA's*
    - *Format for the Budget Office*

*Job Requisitions are delivered to HR then routed to several stations within HR. After leaving HR, the requisitions are sent to the Budget Office then Position Management. Despite the three formats and multi-departmental requisition handling, District administration has difficulty providing assistance to schools when determining projections relative to allocated FTE.*

- Tracking FTE Utilization
  - *Tracking and control of FTE utilization will enable the district to better project and control expenditures on staff costs to reduce the possibility of budget overruns. The District is required to stay within budget on both dollars and FTE. Having full understanding of FTE utilization will allow for more accurate budgeting of FTE and personnel expenses.*

# DELIVERABLES

The following is a listing of deliverables resulting from the Process Analysis Workshop which was conducted May 23<sup>rd</sup> – 26<sup>th</sup>.

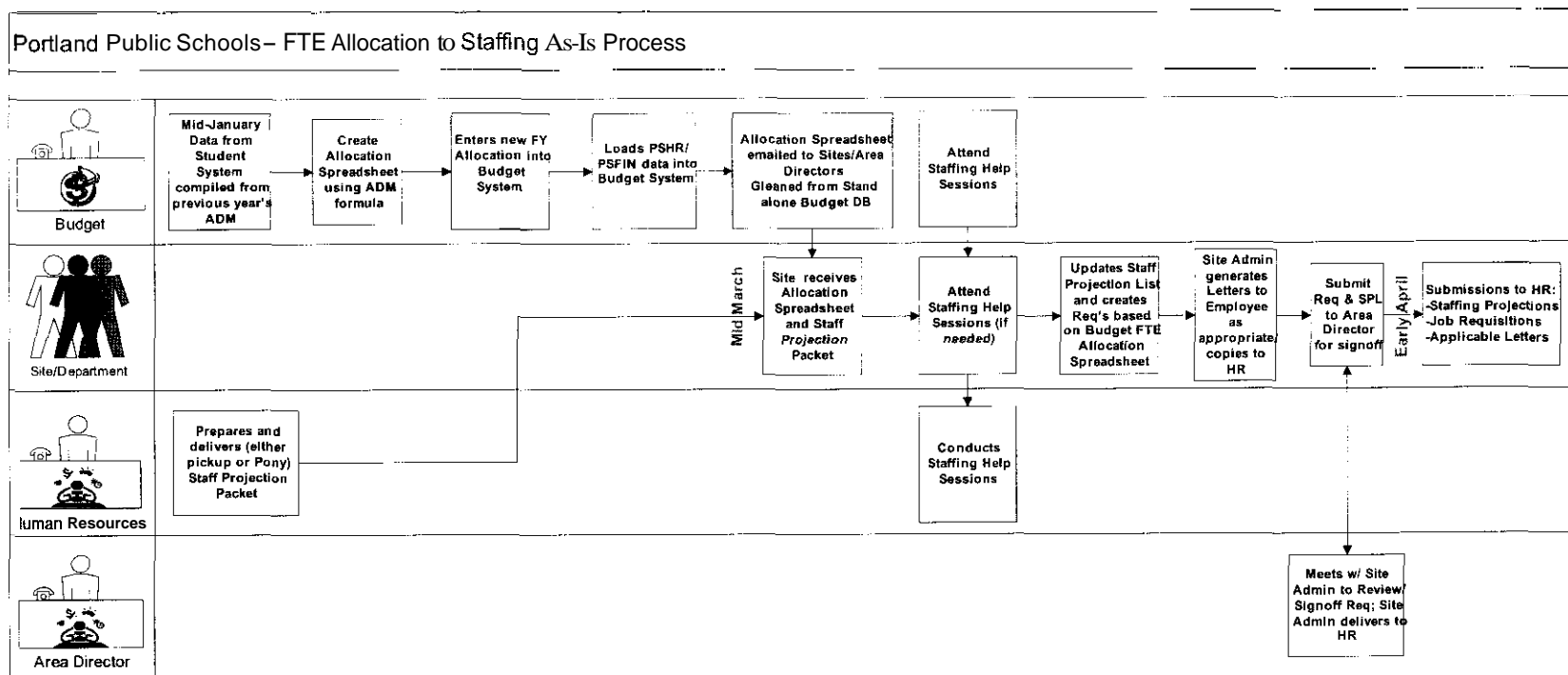
- As Is Process Flow of the FTE Allocation to Staffing Process
- Proposed FTE Allocation to Staffing Process



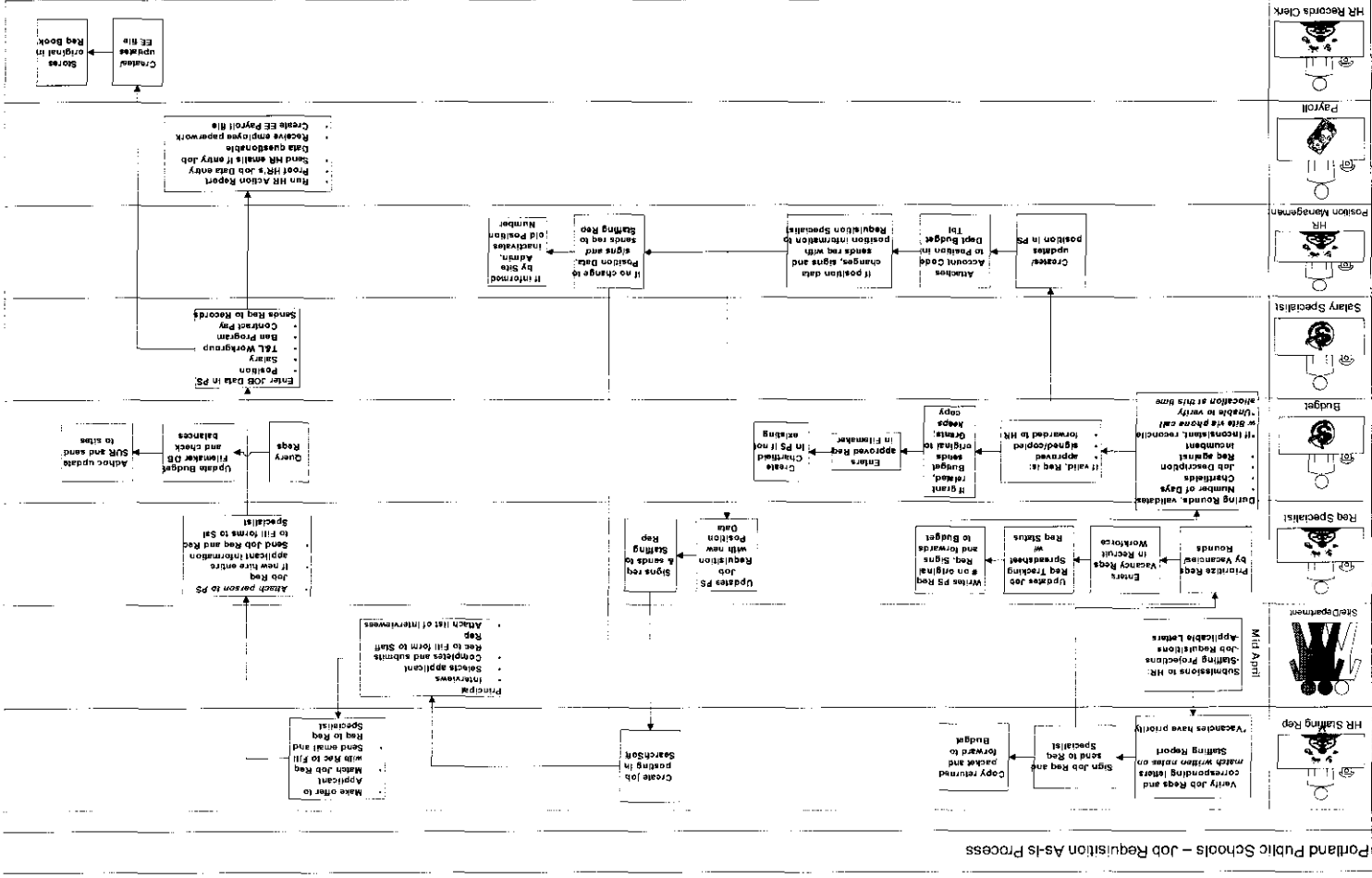
- Process Recommendations
- Employee Type Definition Spreadsheet
- Open Issues Log
- Glossary of PPS Terms

# PROCESS FLOWS

## As Is Process Flow of the FTE Allocation to Staffing Process



### As-Is Process Flow of the Vacancy Requisition Process





## **Requisition Type differences in process Flow**

### **Change of Funding**

- Budget sends the Req to HR Position Management
- HR Position Management updates PS Department Budget Table
- HR Position Management stores the Req in a holding folder for the Req Specialist to review
  - Req Specialist sends Req to Records management for placement in the Req Book (Blue Book)

### **FTE Change**

- HR Position Management sends the Req to the Req Specialist for PS updating
- The Req Specialist updates PS Job Data
- Req forwarded to Staff Rep
- Emails/Letter to Employee
- Prints email for EE file

### **Location Change**

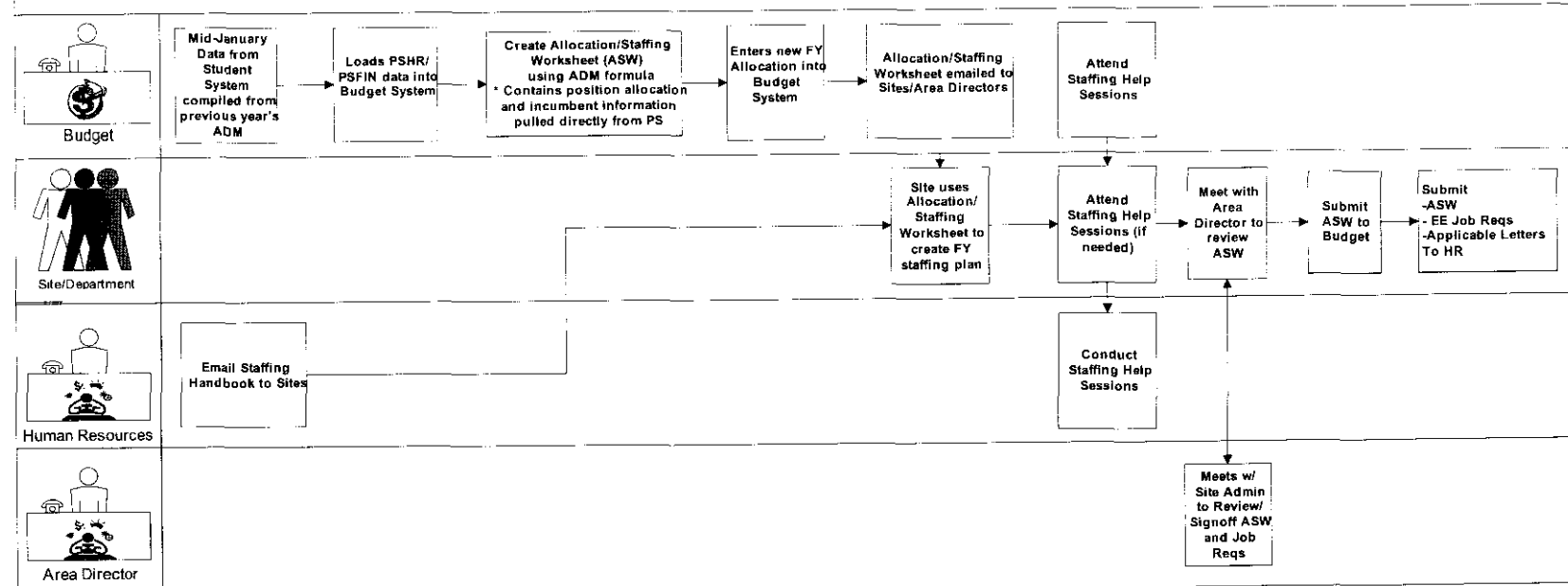
- HR Position Management sends the Rea to the Req Specialist for PS updating
- The Req Specialist updates PS Job Data
- Req forwarded to Staff Rep
- Emails/Letter to Employee
- Prints email for EE file

### **Position Elimination/Unassigned**

- If the employee is unassigned but placed Staffing Rep notifies Employee/forwards Letter to Salary Specialist for update to PS Job Data
- Staffing Rep updates unassigned information on custom PS Assignment page
- Budget gets copies of Unassigned Letters
- Communication to IT for access changed/inactivation

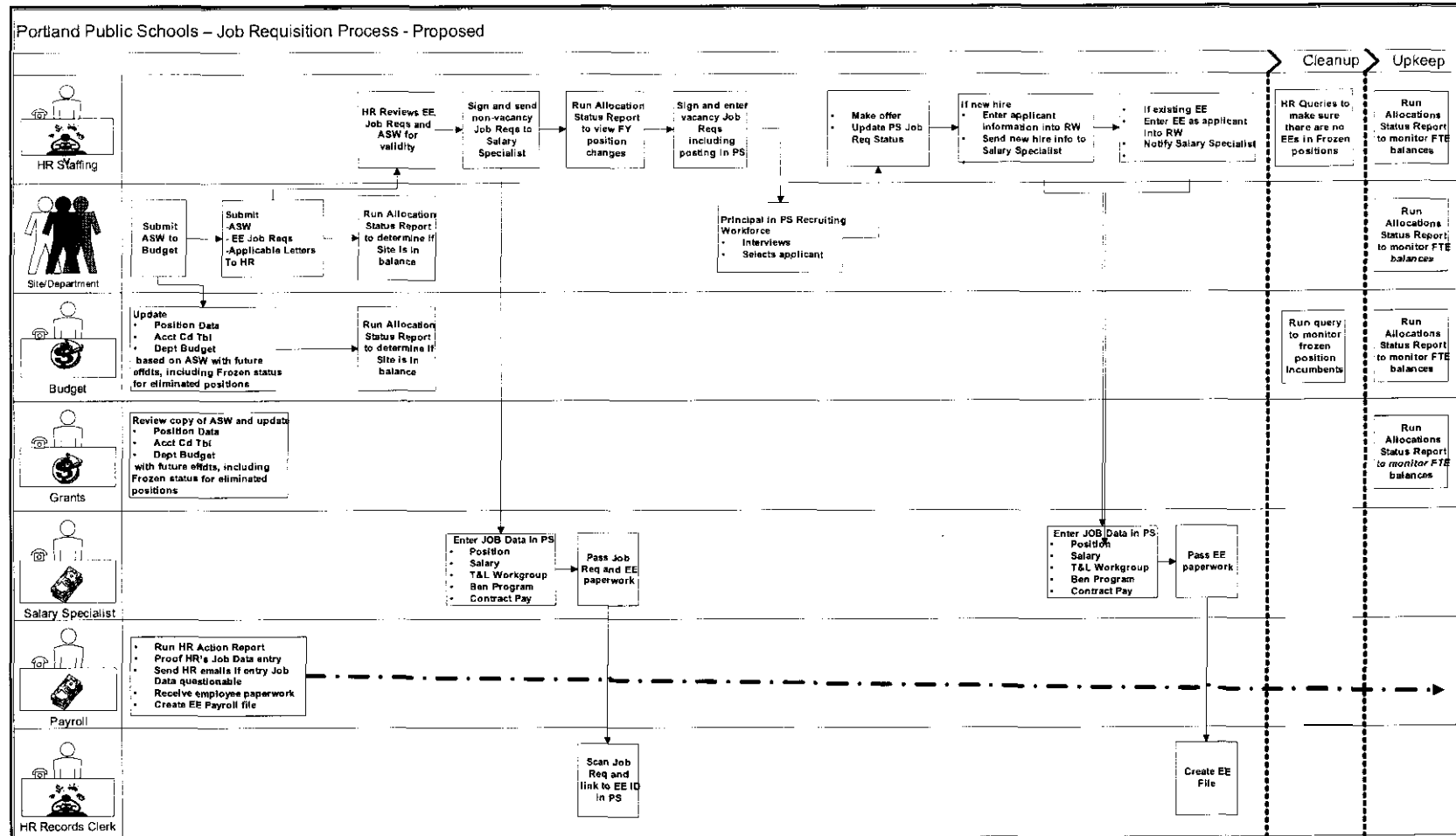
## Proposed FTE Allocation to Staffing Process

### (Portland Public Schools – FTE Allocation to Staffing Process - Proposed)





### As-Is Process Flow of the Vacancy Requisition Process



# PROCESS RECOMMENDATIONS

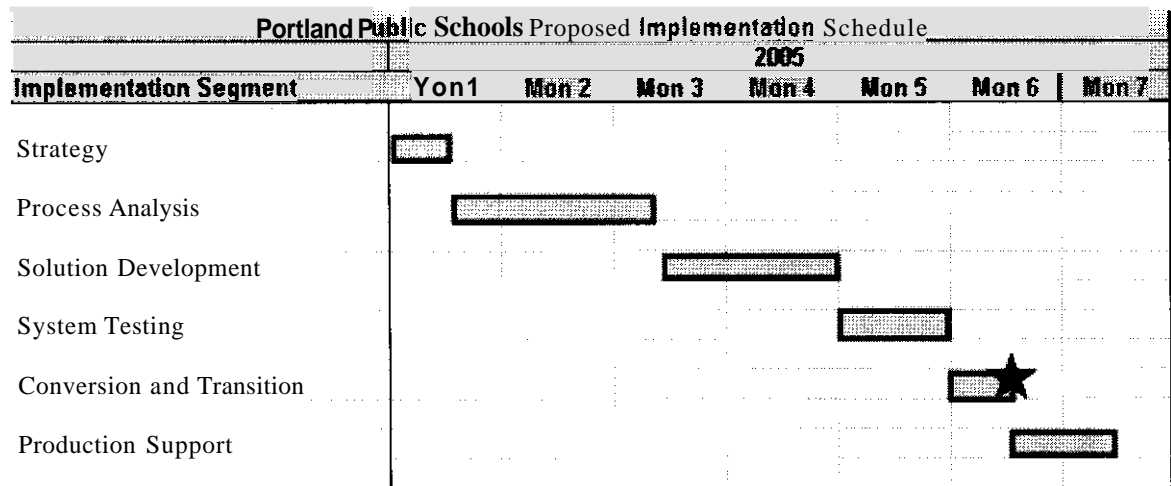
During the Process Analysis Workshop, Empower Solutions worked with Portland Public Schools to identify areas of disconnect and proposed recommendations. The table below shows the disconnects discovered, the ramifications they have on the District's business processes and the proposed solutions to help PPS move towards a streamlined and efficient business environment. Cross-departmental work teams have been established to review these disconnects and solutions to determine the impact on the District

Disconnect	Ramifications	Solution
SearchSoft is a stand-alone, third party recruiting system that does not link to PeopleSoft.	Additional disparate systems create the need for duplicate entry and do not allow for consistent, valid data to be available to the District.	Replace SearchSoft with PeopleSoft Recruiting Solutions, providing the District a single point of entry for the requisition process.
IIR owns and maintains Position Data.	Information is traveling from HR to Budget and back to HR, increasing turnaround time for HR actions.	Budget ownership of Position Data and Department Budgets allows the site to send position and funding requests directly to Budget and allows HR to focus on hiring and retaining employees
There is no District-wide tracking of vacant positions and not all employees are in positions	Budget is not able to ascertain when sites are over-allocated, or when vacancies exist, thus not giving the District a clear picture of their allocations.	All employees are in positions, and a vacant position must exist in order for HR to hire. This allows HR, Budget and the sites to have access to the same position allocation information simultaneously.
The amount of paper forms that flow through the District's departments and the number of times these forms are required to gain signatures throughout the process are excessive.	In the example of a Job Requisition requiring up to 7 approval signatures, at least 2 roles see the req twice, the turnaround time for employee actions is considerably longer than it could be.	<p>Reduce the number of signatures required during the routing process by only using reqs for employee actions, and streamlining the approval process</p> <p>Paper <b>Recommendation to Fill</b> form is replaced by functionality in Recruit Workforce</p> <p>Reduce paper Job Requisitions through a phased approach, ultimately moving towards an online creation and routing of requisitions</p>



Disconnect	Ramifications	Solution
Requisition Specialist enters requisitions in PeopleSoft. HR Staffing Representatives enter the same information into SearchSoft.	This causes the need for two role that are performing the same functions in different systems, which creates a duplicate and prolonged process.	Eliminating the need for SearchSoft by utilizing the functionality in Recruit Workforce allows HR Staffing and HR Requisition Specialist roles to combine responsibilities, moving towards a more generalist and cross-functional organization.
Paper requisitions are manually filed and stored in binders after being passed through several departments.	The only way to see the requisitions is to review the binder which is stored in Records Management, or by reviewing a paper copy housed in individual departments.	Paper Job Requisitions are scanned into PeopleSoft and no longer stored in the Job Requisition Book
Employees will notify departments inconsistently regarding changes to their personal information.	There is no established communication vehicle to relay this information to HR, or to the responsible Department, thus the data is not entered into the system efficiently.	Implementation of Employee Self-Service (ESS) will allow employees to enter their information directly into the system, reducing the dependency on Central Office and on paper forms.
The District has a paper driven time reporting process	This paper driven, labor intensive process does not allow the District to take advantage of the online time capturing functionality available through Time & Labor	While not included in the scope of Phase I, this became evident during the assessment. Full utilization of Time and Labor will streamline the District's time entry process by reducing the amount of paper timecards and the population of employees who will need to complete those timecards.
HR, Budget and Payroll do not normally meet to discuss issues that are District-wide and interdepartmental.	There is not a forum for identifying common issues and creating shared solutions that meets each Department's needs while keeping the District's overall best interests in mind	During the Process Analysis Workshop, a list of issues were identified and tracked in the <i>Open Issues Logs</i> . Interdepartmental task groups were created and assigned to each open issue for further review and solution development. This will enhance communication between departments and will provide a framework to work through issues and proactively define solutions for the District.

# PROPOSED IMPLEMENTATION SCHEDULE



## Strategy & Planning

This segment defines the project team and develops an overall action plan for the project. The following steps support this objective:

- Project Organization
- Technical Readiness and Needs Assessment
- Development and Clarification of Project Goals and Vision
- Work plan Development
- Establishing the Project Workspace and Infrastructure
- Development of Communication Strategy
- Installation of Hardware and Application, if applicable

## Process Analysis

The Process Analysis segment is the point in the project where we many our knowledge of the Software with your knowledge of your business requirements. The tasks in this segment are as follows:

- Review of Inventories and Current Processes and Requirements
- Fit Gap Sessions
- Training Strategy Development
- General Designs



- Development Environment Management

## Solution Development

This project segment is devoted to the finalization of To Be processes, development and unit testing of proposed software modifications, interfaces, and conversion programs. The design and development of custom reports, as well as updates to delivered reports are completed. Tasks in this segment include:

- To-Be Process Development
- Software Modifications
- Program Development
- Organizational Assessment/Roles and Responsibilities
- System Test Planning

## Testing

Once the software modifications, interfaces, and conversion programs are complete, the entire system is subjected to a rigorous and complete system test. This segment allows the team to test the software and ensure that the new business processes support the business needs. This segment tests transactions from a user perspective; hatch processes, security, and workflow as well as any system enhancements. At this time any outstanding Fit issues are addressed and resolved.

An evaluation and “sign-off” on all test results are required. Both PPS and Empower jointly address open issues from Fit analysis and/or System Test and determine resolutions. Also, using the training strategy and To-Be processes developed previously, the end-user training materials and job aids are developed at this time.

## Conversion and Transition

This segment addresses the actual system conversion activities, including the Go-Live date for the PeopleSoft system changes. This segment may involve on-site, end-user training, along with production readiness testing. **Tasks** include:

- Final Data Conversion, if necessary
- Final System Signoff

## Post Production Support

This segment includes the creation of a production support team and helpdesk guidelines to support the changes to PeopleSoft. We assist your help desk and support personnel deal with user needs immediately after the changes to the system are placed into production during this phase of the project.

# APPENDIX

Employee Type Definition Spreadsheet

	Limited Term	Long Term Temp	Temporary Teacher	LTHT (Less Than Half Time)	Hourly Teachers	Full-Time Salaried	Part-Time Salaried	Full-Time Hourly (Ongoing)	Part-Time Hourly (Ongoing)	Substitutes
Days Worked/Work Period	<60 days/FY	>60 days / <= 6 months	>60 days	<20 hrs a week	10 hours/wk or less	N/A	Yes (>20 < 40)	N/A	Yes (>20 < 40)	As assigned
Standard Hours	0	Yes	Yes	Yes	No (There is a limit on hours per day per contract)	40, or as specified by union contract	Yes	40, or as specified by union contract	Yes	No
FTE	0	Yes	Yes	Yes	No	Yes	Yes	Yes	Yes	No
Empl Type	Hourly	Salaried	Salaried	Hourly	Hourly	Salaried	Salaried	Hourly	Hourly	Hourly
Time Reporting Method	Positive Pay	Exception depending on TRM of replaced EE	Exception	Positive Pay	Positive Pay	Exception	Exception	Positive Pay	Positive Pay	Positive Pay
Contract	No	Yes	Yes	No	No	Yes, or S12	Yes, or S12	No	No	No
Seniority eligible	No	Union Specific - Length of Assignment	Union Specific - Length of Assignment	No	No	Yes	Yes	Yes	Yes	No
Form Used	Limited Term form	Job Req	Job Req	Job Req	Job Req	Job Req	Job Req	Various	Various	Application
Health Benefits	No	Yes	Yes	No	No	Yes	Yes	Yes	Yes	Yes
Leave Benefits	No	Yes	Yes	No	No	Yes	Yes	Yes	Yes	No
Sites Use Allocation to Buy	Yes	N/A	N/A	Yes	Yes - Budget tracks manually (SUR)	Yes	Yes	Yes	Yes	No - funded dep on job
Union	Non-Represented	Any except PAT	PAT	Any except PAT	PAT	Any	Any	Any except PAT	Any except PAT	Any excluding PAT regular
Position (Y/N)	No	Yes - Para's no	Yes	No	No	Yes - Para's no	Yes - Para's no	Yes	Yes	No
Comments	Project-based see parking lot for exceptions to Union affiliation. Has definitive end date.	Inherit attributes of LOA incumbent they are replacing. Definitive end date (end of FY).		ex: EA, No end date	Usually Regular Teachers with extra jobs - time reported separately, held for one time payment by PAY			FS and Transportation use unique forms for EE actions	FS and Transpo	SEMS used to request teachers; funded by Jobcode default





## Open Issues Log

Issue #	Issue	Owner	Moving Forward
1	Need LOA communication with Grants establish process for Grant funded LOA's Better tracking of concurrent jobs (MJP's)  Want subs to report in hours not units  Want ALL EEs to have positions How to handle ongoing "un limited term" Need category for unrepresented employees Need to define Long Term Temp approval/rollover process How should vacancies for partial FTE leaves be maintained? Need guidelines for when an employee can work hourly don an unpaid leave	Lucy, Nell, Jan  Michelle, Sarah, Amy, Jan  Heidi, Loretta  Sarona-Lee, Michelle, Terry Sarona-Lee, Michelle, Terry Sarona-Lee, Michelle, Terry  Sarona-Lee, Nell, Amy, Tern. Jan Sarona-Lee, Nell, Amy, Tern. Jan	Existing query?  When is an EE split into MJ's How to track whole person Thru negotiations - underway as of 05 25 05 Track actual hrs Result time reporting can be consistent See Project Charter Determining clear definition of EE Types Determining clear definition of EE Types Determining clear definition of EE Types  Position/Acct Cd/assignment definition  Define guidelines for when employees are allowed to work while on LOA
0	Budget needs more detailed information on duties of PARA	Deborah D, Michelle, Jan. Terry	Define where it best makes sense to house position detailed information FIN (position) and/or HR (assignment) Review job codes for continuity and standardization Discussion of ownership of monitoring Repercussions
11	What is the process for dealing with over allocated Sites?	Heidi, Maureen AD TBD	Develop and communicate consistent standards Interim communication (prior to rollout of ESS) EE Self Service
12	Need to establish guidelines between departments on consistent use of PS effective date employee changes communication	Heidi Sarona Lee Michelle Maureen Greg	
13	Need to review guidelines for when to create a new position and when to reuse an existing one	Jan Pam	Pam has established guidelines need to be incorporated into Issue 4
15	IT's notification of HR actions—need to define a specific process for letting them know an employee needs things like Telephone #'s Hardware Passwords Row Security/Access Status changes resulting in access changes	Jenna Staffing Reps (TBD)	Create logic for notification of HR actions that warrant system access/termination/modification
16	HCM/FIN account code structure and users understanding of the setup also look at reports used & the account code representation on each one (chartfield order spaces)	Joanne Jan Sarah, Steve	Determine most user friendly consistent format of Account Code structure on reports Jan has an Order of Chartfield Elements in Various document
17	LOA process needs to be detailed and analyzed	Amy Terri Sarona-Lee Deborah D Nell	Outline request of LOA to return from LOA process and procedures all types of leaves

### Glossary of PPS Terms

PPS term	Definition
Pony	District mail
Employee Budget Verification Listing (EBVL)	A Budget distributed report which includes (obtain formal definition)
Staffing Projection Report (PPS287SV)	An HR distributed report that is used in conjunction with the Allocation Spreadsheet
FTE Allocation to Staffing Process	Process of allocating FTEs for the upcoming FY staffing
Staffing Utilization Report (SUR)	Budget Filemaker Pro generated report including <u>employee information, but no funding information</u>
Average Daily Membership (ADM)	This is part of the formula derived from student data which is used to determine allocation for the upcoming FY
Allocation Status Report	A custom report developed by Empower Solutions set up to be run by Department, showing position data and total allocation, incumbent information for the Department.
Allocation Staffing Worksheet (ASW) This name was created during the Process Analysis Workshop to differentiate between the existing allocation sheets and the new compilation of: <ul style="list-style-type: none"> <li>• HR's Staffing Projection List</li> <li>• Budget's Allocation Spreadsheet</li> <li>• Budget's Staffing Utilization Report</li> </ul>	Proposed worksheet for the FTE Allocation to Staffing Process and the Job Requisition Process
Budget's Filemaker Pro database	A Filemaker Pro database (obtain formal definition from PPS)
Budget Build System	A Visual Basic database that houses downloads of PeopleSoft Budget information. (obtain formal definition from PPS)
Job Requisition	Paper form used by PPS to request position changes, employee changes, and funding source changes

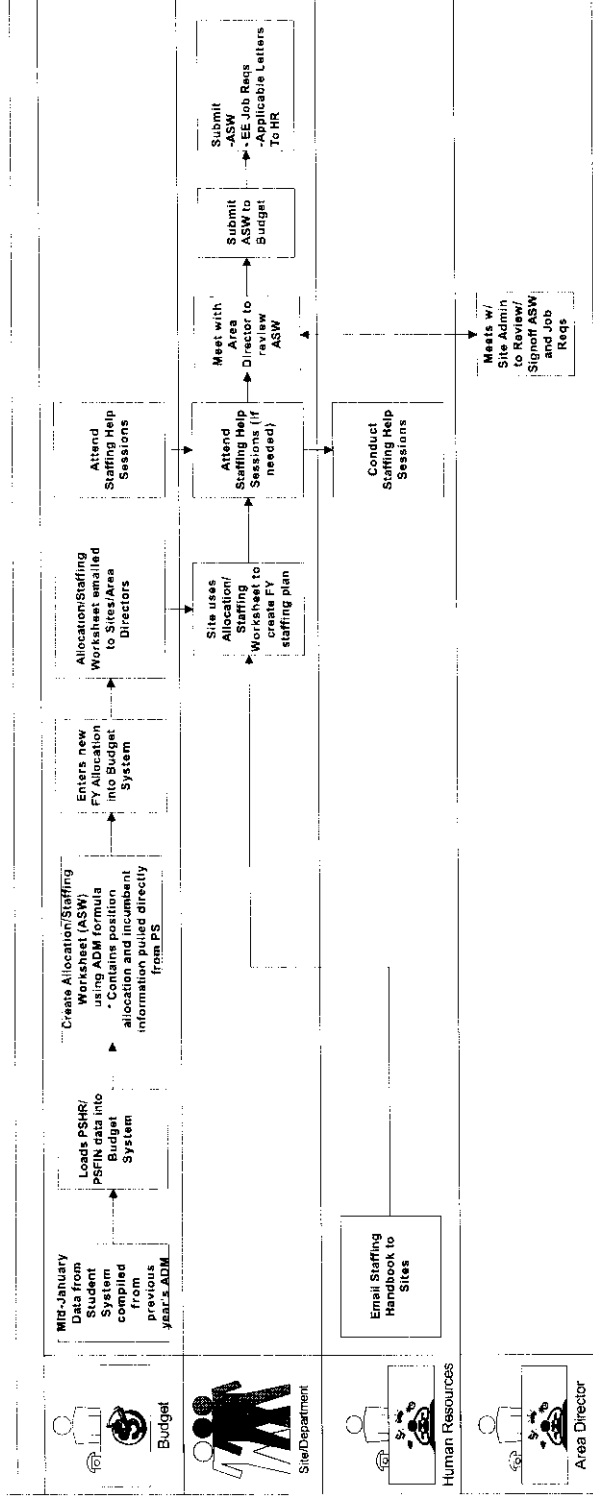


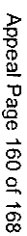
PeopleSoft term	Definition
Position Control	Includes the establishment, review, control, maintenance and reporting of allocation for full-time equivalent (FTE) positions, as well as positions that may be hourly, without a defined FTE.
Position Management	A module within PeopleSoft that allows for: creating and tracking position data and its history; processing employee appointments by position; maintaining incumbent data; maintaining organizational structures; budgeting for positions and departments; and viewing incumbent, position, and budget histories.
Position	Often described as the 'office' or 'classroom' that is built in the system for an employee to move in and out of. Attach data to the positions and move employees in and out of those positions. Specific information related to a position, such as salary or standard hours can be tracked, regardless of whether an employee fills it. When the position is vacant the common thread that binds the data together is not lost. Use data specific to each position as the basis for organizational planning, recruitment, career planning, and budgeting.
Position Pool	Position pools establish groups of positions for budgeting purposes. Budget information and encumbrance calculation rules are then attached to specific position pools. Position pools cannot span departments. Each position in a position pool must be in the same department.
Department	The source of funding for a position (as compared to the location, which depicts where an employee is physically located for work)
Location	The physical entity where an employee is working



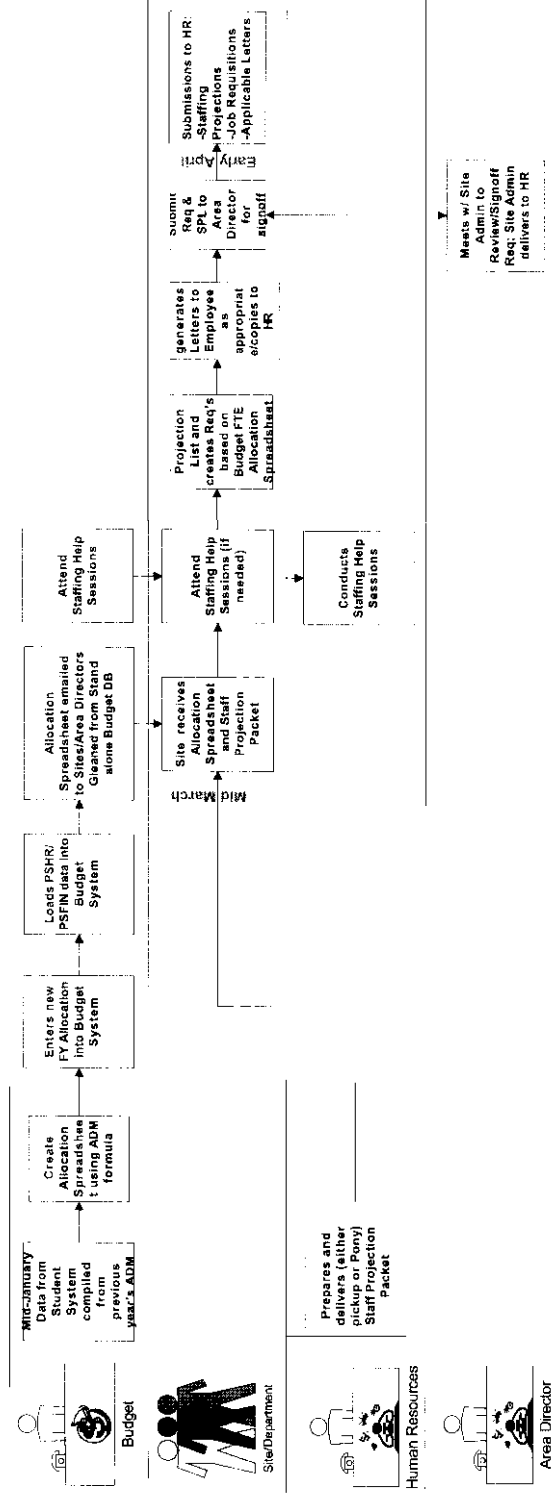
<b>PeopleSoft term</b>	<b>Definition</b>
Classified Indicator	This field is used to associate the position with an FTE Classification that was established on the Department Budget FTE page. When an employee is hired into a position in the Administer Workforce menus, the system displays the FTE data tied to the Position in the Job Data pages for the employee. The classified indicator is can also be used as a label for classified or certificated employees, for example.
Chartfields	These are the codes that are attached to components of the budget, such as earnings, deductions, and taxes, to indicate the funding source the system should attribute to each expense.
Job Requisition	PeopleSoft's online form indicating there is a vacancy in the system that needs to be oosted and filled.
eApps	PeopleSoft's eApplications which includes employee self-service (ESS) and manager self-service (MSS). Includes ePay, eProfile, eCompensation, eBenefits, eRecruit, eDevelopment.

# Portland Public Schools – FTE Allocation to Staffing Process - Proposed

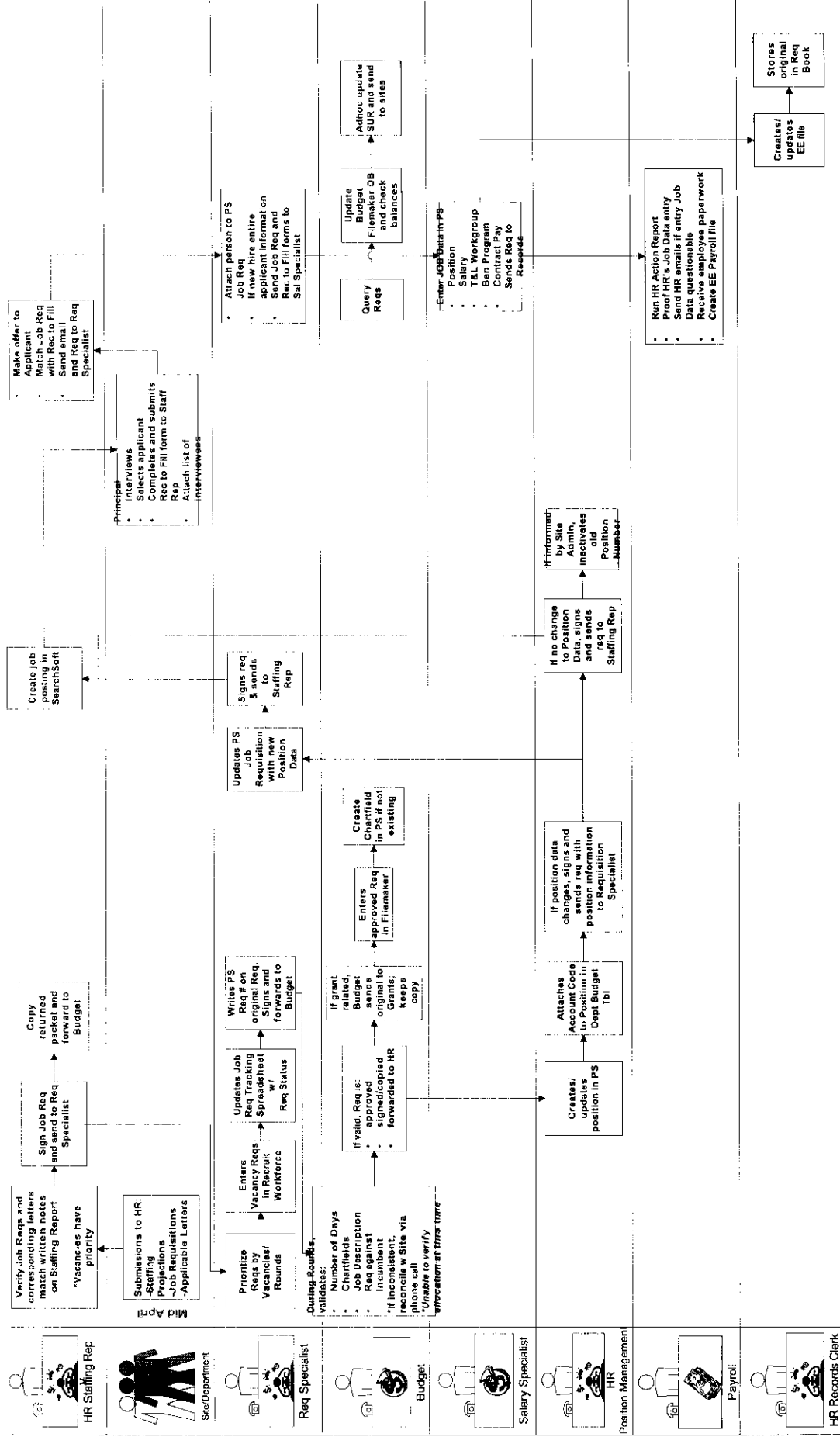




# Portland Public Schools – FTE Allocation to Staffing As-Is Process



# Portland Public Schools – Job Requisition As-Is Process





**ATTACHMENT G  
PPS FTE Comparisons**

Limited Term		Long Term Temp	Temporary Teacher	LTHT (Less Than Half Time)	Hourly Teachers	Full-Time Salaried	Part-Time Salaried	Full-Time Hourly (Ongoing)	Part-Time Hourly (Ongoing)	Substitutes
Days Worked Work Period	<60 days/FY	>60 days / <= 6 months	>60 days	<20 hrs a week	10 hours/wk or less	N/A	Yes (>20 < 40)	N/A	Yes (>20 < 40)	As assigned
Standard Hours	0	Yes	Yes	Yes	No (There is a limit on hours per day per contract)	40, or as specified by union contract	Yes	40, or as specified by union contract		
FTE	0	Yes	Yes	Yes	No	Yes	Yes	Yes		
Employee Type	Hourly	Salaried	Salaried	Hourly	Hourly	Salaried	Salaried	Hourly	Hourly	Hourly
Time Reporting Method	Positive Pay	Exception depending on FRM of replaced EE	Exception	Positive Pay	Positive Pay	Exception	Exception	Positive Pay	Positive Pay	Positive Pay
Contract	No	Yes	Yes	NO	NO	Yes, or S12	Yes, or S12	NO		
Seniority eligible	No	Union Specific - Length of Assignment	Union Specif -Length of Assignment	No	NO	Yes	Yes	Yes		
Form used	Limited Term form	Job Req	Job Req	Job Req	Job Req	Job Req	Job Req	Various	Various	Application
Health Benefits	No	Yes	Yes	NO	No	Yes	Yes	Yes	Yes	Yes
Leave Benefits	No	Yes	Yes	NO	No	Yes	Yes	Yes	Yes	No
Sites Use Allocation to Buy	Yes	NIA	N/A	Yes	Yes. Budget tracks manually (SUR)	Yes	Yes	Yes	Yes	No - funded dep on job
Union	Non-Represented	Any except PAT	PAT	Any except PAT	PAT	Any	Any	Any except PAT	Any except PAT	Any excluding PAT regular
Position (Y/N)	NO	Yes - Para's no	Yes	NO	NO	Yes - Para's no	Yes - Para's no	Yes	Yes	No
Comments	Project-based - see parking lot for exceptions to Union affiliation. Has definitive end date.	inherit attributes of LOA incumbent they are replacing. Definitive end late (end of FY)		ex: EA. No end date.	Usually Regular Teachers w/extra jobs - time reported separately, held for one time payment by PAY			FS and Transportation use unique forms far EE	FS and Transportation use unique forms for EE actions	SEMS used to request teachers; funded by Jobcode default